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Stations and Newspapers)	
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Waiver Policy)	

**REVIEW OF THE INCREASES IN
NON-ENTERTAINMENT PROGRAMMING PROVIDED
IN MARKETS WITH NEWSPAPER-OWNED TELEVISION STATIONS**

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Prepared for Media General, Inc.

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Introduction

This study examines whether and to what extent common ownership of a daily newspaper and local television station in the same market is associated with the broadcast of increased amounts of news, information, and other non-entertainment programming. To answer that question, this study measured the amount and type of non-entertainment program material aired on network affiliated television stations in markets with common ownership of daily newspapers and television stations (“convergence markets”) and compared that to the amount and type aired on network affiliated television stations in markets without common ownership of daily newspapers and television stations (“non-convergence markets”).

Research Methodology

The research question was operationalized with regard to Media General’s convergence markets. Specifically, the study examined (i) the six Nielsen Designated Market Areas (“DMAs”) in which Media General owns both a television station and a local newspaper, and (ii) the next largest DMA. (None of the larger DMAs includes a daily newspaper/television station combination.) Thus, for example, the study compared the Tampa/St. Petersburg DMA (ranked 14th) to the Minneapolis/St. Paul DMA (ranked 13th). The complete list of paired markets is as follows:

Media General Convergence Market	Paired Market
Tampa/St. Petersburg, FL (DMA #14)	Minneapolis/St. Paul, MN (DMA #13)
Roanoke-Lynchburg, VA (DMA #67)	Lexington, KY (DMA #66)
Tri-Cities, VA/TN (DMA #93)	Davenport, IA-Rock Isl., IL- Moline, IL (DMA #92)
Florence-Myrtle Beach, SC (DMA #109)	Charleston, SC (DMA #108)
Columbus, GA (DMA #126)	Yakima-Pasco-Richland- Kennewick, WA (DMA #125)
Panama City, FL (DMA #159)	Bangor, ME (DMA #158)

For each market, the study obtained television program listings from *TV Guide* for the full-service television stations affiliated with the ABC, CBS, NBC, and Fox broadcast networks. The study examined one week of programming on all studied stations that was broadcast between 12:01 a.m. on Tuesday, November 13, 2001 and 12:00 midnight on Monday, November 19, 2001.

The study categorized all non-entertainment programming on the four stations in each market within a twenty-four hour day for the seven days in the sample week. The categories applied to programming information were identified in the *TV Guide* listings, with the exception of educational children's programming. To identify educational children's programming, the study relied on Children's Television Programming Reports (FCC Form 398) filed by the studied stations with the FCC and made available on the FCC's Internet web-site. In addition, the study relied on information from the Internet web-site of the Center for Media Education ("CME"), which lists several children's programs deemed by CME to be educational.

The study coded each network, syndicated, and locally produced non-entertainment programming broadcast on the studied stations according to one of the following seven categories:

1. *Newscasts*: Applies to regularly scheduled local and national newscasts, such as ABC's "World News Tonight."
2. *News/Information*: Covers regularly scheduled news or information programming addressing current events that is not part of a regular newscast. This includes network morning shows (e.g., "Today," "Good Morning America") as well as prime-time news magazines (e.g., "60 Minutes," "Dateline," "20/20"). This category specifically excludes tabloid shows (e.g., "Inside Edition," "Entertainment Tonight," "Extra") and talk shows (e.g., "Maury," "Rosie," "Ananda Lewis," "Montel Williams").
3. *Public affairs*: Applies to all programs addressing current events with newsmakers or other relevant individuals. This includes programs such as "Nightline," "Meet the Press," and "Face the Nation."
4. *Instructional*: Comprises programming providing information, instruction, or advice. In the current sample, this category includes shows like "Martha Stewart Living," "Bob Vila's Home Again," and "Rebecca's Garden."
5. *Children's Educational*: Applies to programming with educational or informational value to children ages sixteen years or younger, according to Form 398s available on the FCC's Internet web-site and to CME's Internet web-site. This category includes programming such as "Disney's Doug," "Disney's Recess," "City Guys," and "Awesome Adventures."
6. *Religious*: Includes any programming featuring a religious service or addressing religious topics. The sample includes several local church services as well as syndicated offerings such as "Creflo A. Dollar," "Jack Van Impe," and the "The Old Time Gospel Hour."
7. *Agriculture*: Comprises programming about agricultural news, farming techniques and related topics. In the current sample, this category includes "Ag Day" and "U.S. Farm Report" plus more localized programs.

By coding the programming appearing on the studied stations during the representative week, it is possible to quantify the amount of non-entertainment programming broadcast by the studied stations. Tables 2 through 13 provide this data for each of the twelve DMA's. By cross-tabulating the program categories against network affiliated stations, it is possible to compare the results for each pair of markets.

The presentation differed in minor ways from previous studies of this sort. For example, previous researchers employed multiple regression analyses based on a data set derived from station program reports filed with the FCC that have no contemporary equivalent. The study, however, attempted to keep the research procedures and analytic categories as close as possible to previous research in this field. Wherever data is not presented herein, it is available in the data set for public inspection. Other researchers have discounted the airtime to account for commercials. I did not do so because commercials are constant across stations. The only commercial-free non-entertainment program type is religious programming, which accounted for less than two percent of total programming and was not significantly correlated with convergence.

Convergence Markets Offer More Non-Entertainment Programming

Table 1 summarizes the study results from all six markets, which in turn are depicted in Tables 2 through 13. The first two rows of Table 1 highlight the key comparison between Tampa/St. Petersburg and Minneapolis/St. Paul. The average hours of non-entertainment programming in these rows was taken from Table 2, which provides individual market results for the non-convergence market of Minneapolis/St. Paul, and Table 3, which provides such results for the convergence market of Tampa/St. Petersburg DMA.

Table 1 indicates that the network affiliated stations in Tampa/St. Petersburg broadcast substantially more programming than network affiliated stations in Minneapolis/St. Paul: 236 to 215.5 total hours over the course of the sample week. That equates to an average of 59 hours per station in the convergence market in contrast to 53.9 hours per station in the non-convergence market. This 5.1 hour weekly difference represents three-quarters of one additional hour of non-entertainment programming per station per day in the convergence market of Tampa/St. Petersburg. (The data set breaks down the totals to the quarter hour; they are rounded to the half hour here for ease of presentation.)

Tables 4 through 13 present the results for each of the other convergence and non-convergence markets, and the totals for these markets are also summarized in Table 1. To facilitate comparisons among markets, Table 1 translates the absolute differences into percentage terms. On this basis, the hypothesis testing can proceed quickly, without detailed reference to particular markets, but with the data available for inspection.

The data appearing in Table 1 favor the convergence markets individually in five out of the six matched pairs and cumulatively when all pairs are combined into one total. In particular, in five of the six market pairings, the stations in the convergence market aired more non-entertainment programming than the stations in the paired non-convergence market. The differences ranged from

a high of 6.5 average additional hours in the Tri-Cities – Davenport pairing (15 percent) to a low of 0.7 hours in the Columbus – Yakima pairing (one percent). In the Roanoke - Lexington pairing, the stations in the non-convergence market broadcast an average of 5.0 more hours of non-entertainment programming than the stations in the paired convergence market (12 percent).

The cumulative average amount of non-entertainment programming in the convergence markets exceeded the amount of non-entertainment programming in the non-convergence markets by 2.9 hours per station, which represents a difference of 6.0 percent.

Conclusion

This study matched convergence and non-convergence markets for size and resources in order to isolate the effects of convergence on the amount of non-entertainment programming. The main finding is that convergence is consistently associated with higher levels of non-entertainment programming. Within the parameters of this research, the pattern of association is compelling.

Table 1
Converged vs. Non-Converged Markets:
Hours of Non-Entertainment Programming Per Week

Market Pair	DMA No.	Average per Station	Difference	Percentage Difference
Minneapolis/St. Paul, MN	13	53.9	+ 5.1	+ 9%
* Tampa, FL	14	59.0		
Lexington, KY	66	48.3	- 5.0	- 12%
* Roanoke, VA	67	43.3		
Davenport, IA	92	43.4	+ 6.5	+ 15%
* Tri-Cities, VA/TN	93	49.9		
Charleston, SC	108	46.6	+ 3.7	+ 8%
* Florence, SC	109	50.3		
Yakima, WA	125	45.4	+ 0.7	+ 1%
* Columbus, GA	126	46.1		
Bangor, ME	158	51.0	+1.8	+ 4%
* Panama City, FL	159	52.8		
ALL CONTROLS		48.1	+2.9	+ 6%
* ALL CONVERGED		51.0		

* Converged Market

Table 2			
Amount of Non-Entertainment Programming Broadcast in Minneapolis/St. Paul, MN DMA #13			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	122.0	30.5	18.2%
News/Information	60.0	15.0	8.9%
Public Affairs	6.0	1.5	0.9%
Instructional	8.5	2.1	1.3%
Children's Educational	11.5	2.9	1.7%
Religion	4.5	1.1	0.7%
Agriculture	3.0	0.8	0.4%
TOTAL	215.5	53.9	32.1%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

Table 3			
Amount of Non-Entertainment Programming Broadcast			
in Tampa/St. Petersburg, FL DMA #14			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	122.5	30.63	18%
News/Information	91.0	22.75	14%
Public Affairs	5.0	1.25	1.0%
Instructional	9.0	2.25	1.0%
Children's Educational	4.5	1.13	1.0%
Religion	4.0	1.00	1.0%
Agriculture	0.0	0.00	0.0
TOTAL	236	59.0	36%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

Table 4			
Amount of Non-Entertainment Programming Broadcast			
in Lexington, KY DMA #66			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	107.5	26.9	16.0%
News/Information	57.0	14.3	8.0%
Public Affairs	7.0	1.8	1.0%
Instructional	2.5	0.6	*
Children's Educational	10.5	10.5	2.0%
Religion	8.5	2.1	1.0%
Agriculture	0.0	0.0	0.0%
TOTAL	193	48.3	29.0%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

* Less than ½ %

Table 5			
Amount of Non-Entertainment Programming Broadcast			
in Roanoke-Lynchburg, VA DMA #67			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	72.0	18.0	11%
News/Information	68.0	17.0	10%
Public Affairs	5.0	1.3	1.0%
Instructional	4.0	1.0	1.0%
Children's Educational	12.0	3.0	2.0%
Religion	8.5	2.1	1.0%
Agriculture	3.5	0.9	1.0%
TOTAL	173	43.3	27.0%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

Table 6			
Amount of Non-Entertainment Programming Broadcast in Davenport, IA-Rock Isl., IL-Moline, IL DMA #92			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	84.0	21.0	13.0%
News/Information	54.5	13.6	8.0%
Public Affairs	7.0	1.8	1.0%
Instructional	10.5	2.6	2.0%
Children's Educational	10.0	2.5	2.0%
Religion	4.0	1.0	1.0%
Agriculture	3.5	0.9	1.0%
TOTAL	173.5	43.4	27%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

Table 7			
Amount of Non-Entertainment Programming Broadcast			
in Tri-Cities, VA/TN DMA #93			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	102.0	25.5	15.0%
News/Information	54.5	13.6	8.0%
Public Affairs	9.0	2.3	1.0%
Instructional	7.5	1.9	1.0%
Children's Educational	12.0	3.0	2.0%
Religion	13.5	3.4	2.0%
Agriculture	1.0	0.3	*
TOTAL	199.5	49.9	29%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

* Less than ½ %

Table 8			
Amount of Non-Entertainment Programming Broadcast			
in Charleston, SC DMA #108			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	97.0	24.3	14.0%
News/Information	52.5	13.1	8.0%
Public Affairs	6.0	1.5	1.0%
Instructional	8.0	1.6	1.0%
Children's Educational	11.5	2.9	2.0%
Religion	10.5	2.6	2.0%
Agriculture	1.0	0.25	*
TOTAL	186.5	46.6	28%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

* Less than ½ %

Table 9			
Amount of Non-Entertainment Programming Broadcast in Florence-Myrtle Beach, SC DMA #109			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	96.8	24.2	14.40%
News/Information	63.0	15.8	9.38%
Public Affairs	8.5	2.1	1.26%
Instructional	4.0	1.0	0.60%
Children's Educational	11.0	2.8	1.64%
Religion	14.5	3.6	2.16%
Agriculture	3.5	0.9	0.52%
TOTAL	201.3	50.3	30.0%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

This data set includes the programming of Columbia, South Carolina station WIS-TV, which provides Florence with the only over-the-air service of a full-power NBC affiliate.

Table 10			
Amount of Non-Entertainment Programming Broadcast in Yakima-Pasco-Richland-Kennewick, WA DMA #125			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	91.0	22.8	13.5%
News/Information	54.5	13.6	8.1%
Public Affairs	7.0	1.8	1.0%
Instructional	8.0	2.0	1.2%
Children's Educational	13.0	3.3	1.9%
Religion	3.5	0.9	0.5%
Agriculture	4.5	1.1	0.7%
TOTAL	181.5	45.4	27.0%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

Table 11			
Amount of Non-Entertainment Programming Broadcast in Columbus, GA DMA #126			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	91.5	22.9	14.0%
News/Information	54.5	13.6	8.0%
Public Affairs	5.5	1.4	1.0%
Instructional	7.5	1.9	1.0%
Children's Educational	12.0	3.0	2.0%
Religion	13.0	3.3	2.0%
Agriculture	0.5	0.1	*
TOTAL	184.5	46.1	28%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

* Less than ½ %

Table 12			
Amount of Non-Entertainment Programming Broadcast			
in Bangor, ME DMA #15			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	79.0	26.3	16.0%
News/Information	51.0	17.0	10.0%
Public Affairs	5.0	1.7	1.0%
Instructional	6.5	2.2	1.0%
Children's Educational	7.5	2.5	2.0%
Religion	3.5	1.2	1.0%
Agriculture	0.5	0.2	*
TOTAL	153	51	31%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

* Less than ½ %

Table 13			
Amount of Non-Entertainment Programming Broadcast			
in Panama City, FL DMA #159			
Program Type	<i>Total Length (in Hours)</i>	<i>Weekly Avg. (in Hours)</i>	<i>% of Total Broadcast Hours</i>
Newscasts	88.5	22.1	13.0%
News/Information	67.0	16.8	10.0%
Public Affairs	6.0	1.5	1.0%
Instructional	8.5	2.1	1.0%
Children's Educational	12.5	3.1	2.0%
Religion	28.5	7.1	4.0%
TOTAL	211	52.8	31%

Note: Totals for program types may not sum precisely to column totals due to rounding error.

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Books

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